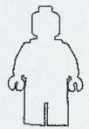


Future Of Work,  
Productivity,  
Cloud ERP

# Israel Market Study 2023

Reut Shefer-Bar



**STKI.INFO**

Copyright@STKI\_2023 Do not remove source or attribution from any slide, graph or portion of graph

1

# We can work it out

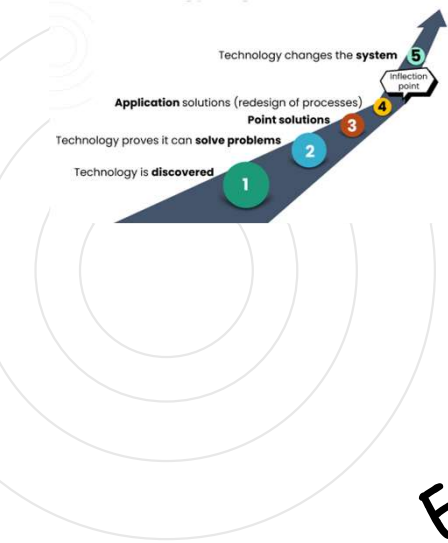


HR, Talent, learning  
and Skills

"The Beatles"  
were the  
"Generative AI"  
of music

The Beatles - Reuters

# The Pendulum Swing

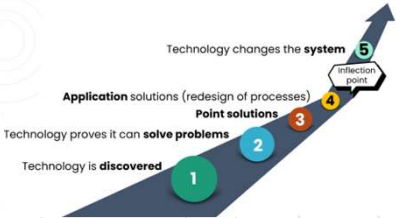


Employers

Employees

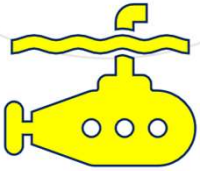


# Future of work



## 100 Million

Employees will switch occupations by 2030



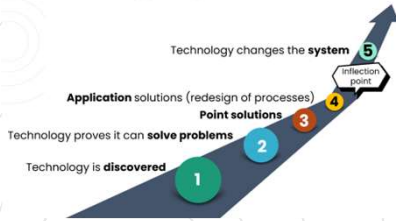
**High-skill jobs – STEM** (Science, Technology, Engineering, Math)-  
position will increase.



**Aging Population** - increase demand for nurses,  
home care, technicians...



# Future of work – Automation

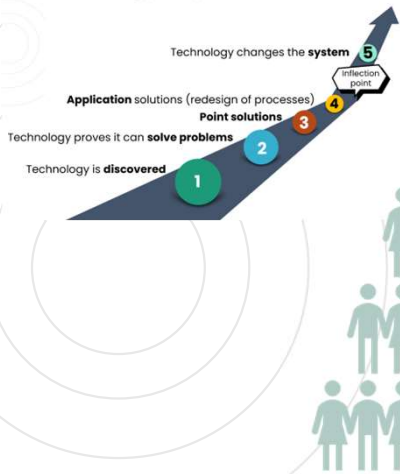


**85** Millions jobs will vanish



**97** Millions new jobs will appear

# Y+Z Generations



75% of workforce by 2025

 They ask question, and Micromanagement will usually not work.

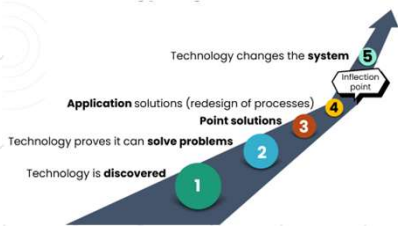
 Data - basic to decisions.

 Knowledge is not from traditional media.

**מה ה"בומר" ז'וזה מורינו לא מבין על שוק העבודה?**

מורינו הוא ממש לא המבוגר היחיד שמתקשה עם עובדים מילניאלים, שלא מעוניינים לסכן את עצמם ואת הקריירה שלהם בשביל מטרה לטווח הקצר וגם לא נופלים במניפולציות דרך התקשורת "הרגילה". אז מה ההבדל בין מורינו למאמנים בני דורו שמצליחים עם הדור החדש?

# Y+Z Generations



## Freelancers and Gig Economy (Fiverr, Upwork...)



36%



10%



## Slashers – Working or doing 2 or 3 different things

UI/interior designer  
Lawyer/Content writer

# Technology-organizational model

## People

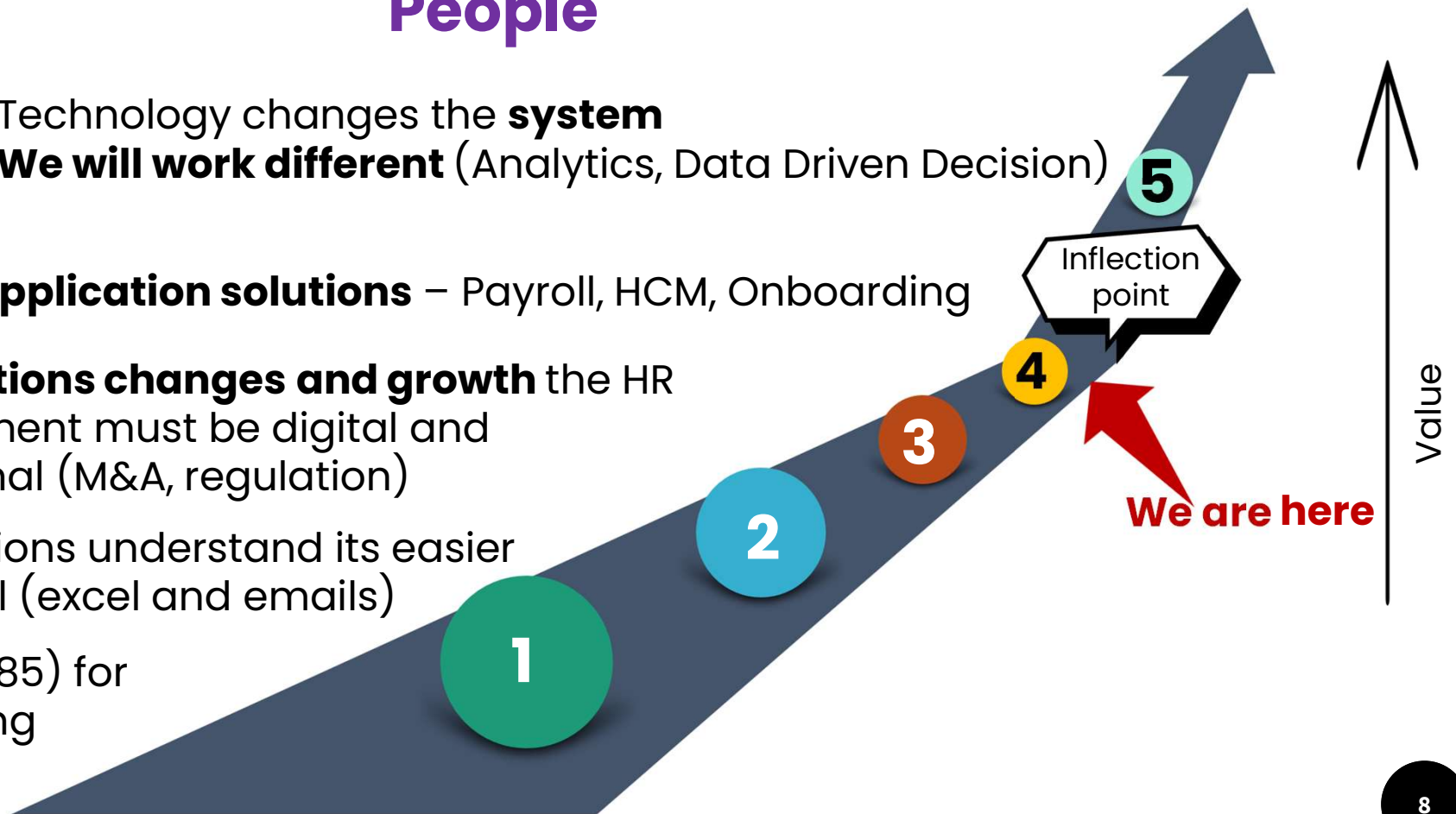
Technology changes the **system**  
**We will work different** (Analytics, Data Driven Decision)

**Application solutions** – Payroll, HCM, Onboarding

**Organizations changes and growth** the HR  
management must be digital and  
Professional (M&A, regulation)

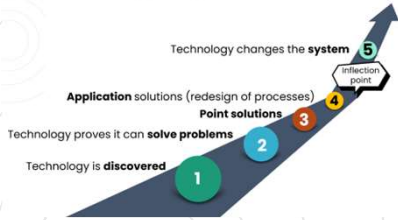
Organizations understand its easier  
And useful (excel and emails)

**Excel** (1985) for  
everything





# HR and IT managers Challenges



## No "Tkanim"



Most enterprises don't recruit for new positions, because of uncertainty, and Unstable Economic, interest rate etc.

## מפוטרי הייטק נלחמים על מקומם בשוק - "המעסיקים הם כמו ילד בחנות ממתקים"

תהליכי מיון ארוכים ועמוסי מועמדים, חברות שמבטלות את התקן רגע לפני חתימת החוזה וכאלה שפשוט מפסיקות לחזור לפניית מועמדים ■ מאחורי העלייה החדה במספר מבקשי העבודה בהייטק מסתתרים סיפורים אישיים: "צריך להקיז דם רק כדי שישקלו את המועמדות שלך"

קריאת זן שמרו 34

לפני כחודש פירסם טל מיזל פוסט המוריסטי על תהליך חיפוש עבודה בקבוצת הפייסבוק הפופולרית "צרות בהייטק". בפוסט תיאר מיזל שיחה בדיונית עם מגייסת שמתקשרת להציע לו הצעת עבודה אטרקטיבית כראש צוות בדיקות תוכנה. תוך כדי ההצעה היא לפתע מודיעה לו שהחברה נכנסה ממש הרגע להקפאת תקנים ומנתקת לו את השיחה



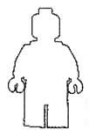
אופיר דור

התראות במייל  
26 במרץ 2023



## Talent Shortage and Experience in specific vertical

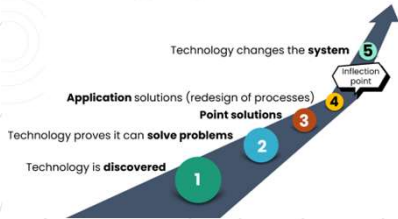
Insurance, health, security, banks...



STKI.INFO

Copyright@STKI\_2023 Do not remove source or attribution from any slide, graph or portion of graph

# Learning and Skills



Our basic definition is  
“**Role based**”, But it changes to:  
“**Skills-based**” hiring, workforce  
planning, Skills-based pay



“Reskill current team  
while outsource the  
“old IT”

Pini Cohen

## How you match LinkedIn



3 skills match your profile. Stand out by adding other skills you have.

### Skills added by the job poster

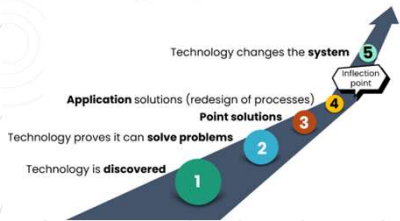
- ✓ 3 skills on your profile  
Communication, Analytical Skills, and Training
- ⚠ 7 skills missing on your profile  
Written Communication, Operational Intelligence, Intelligence Collection, Assessm...



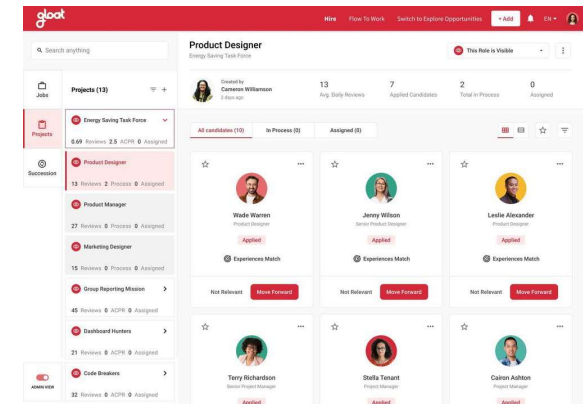
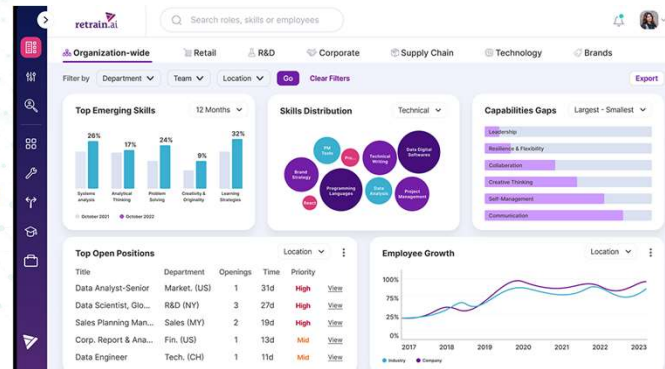
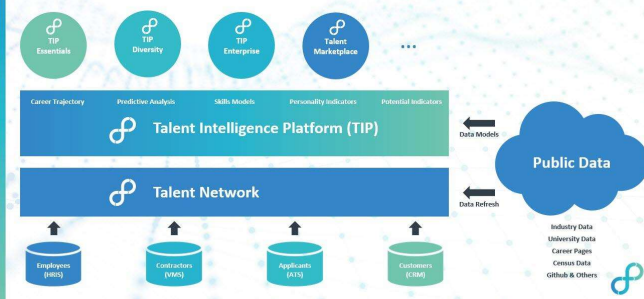
# AI for Learning and Skills

**Reskilling** is and will be part of employee life-cycle

**AI tools** AI provides good results for the “manual” job we used to do (what skills we need; how can we train out team better etc...)



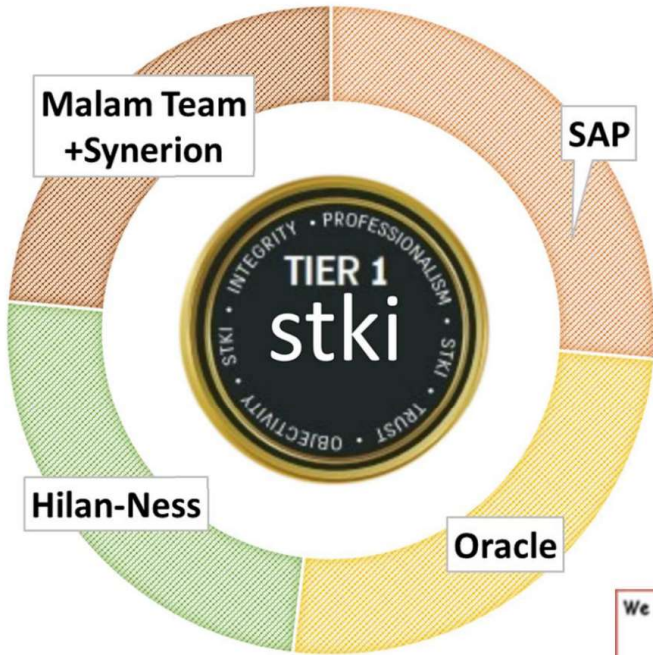
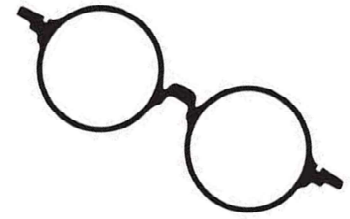
## Eightfold Talent Intelligence Platform (TIP)



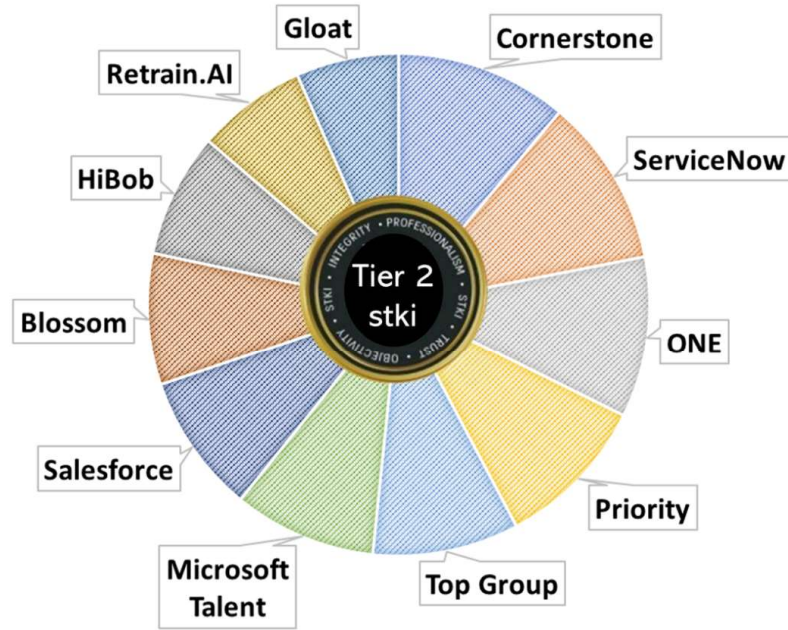


software market

# HR/ Talent Mgmt./ LMS APPLICATIONS



We rank VENDORS by REVENUE and CLIENT MINDSHARE



# I RECOMMEND

**1.** Even though it seems like the major issue right now, the market is constantly changing, the talent issue and skilling will be more complicated through time, especially because of the high and wide level of skills needed. Get ready for 2024.

**2.** Use AI tools, the knowledge it holds is much more varied than what we have.

“Those who will leverage AI will become high Performers very fast”

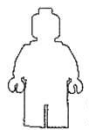
Einat Shimoni



## WHY

**1.** The market doesn't recruit much, no new position – which is OK, But also no new definitions, the knowledge and tools of today can be irrelevant 3 years from now, always think ahead.

**2.** AI brings great opportunities and advantages for companies. Saves time and makes everything more accurate.



# A word to Vendors

## Time to Rethink.

Just a Word.

Do you currently offer tools or services that help manage people? will these tools and services be relevant 3 years from now?

Think outside your box how to create more value: Partnerships, creating AI tools?

**מלם תים קונה את השליטה בסינריון בכ-50 מיליון שקל - כדי להתרחב לצפון אמריקה**

מלם תרכוש כ-50% מהחברה שמציעה פתרונות שכר ונוכחות לארגונים, ותוכל לקנות את היתרה בסכום משתנה של 12 מיליון שקל לכל היותר בתלות בתוצאות ■ סינריון הכניסה אשתקד 42 מיליון שקל ורשמה EBITDA של 655 אלף שקל

**פריוריטי קונה את עובדיסנט ב-40 מיליון שקלים**

החברה הנרכשת מציעה מערכת לניהול נוכחות עובדים ובקרת תקציבית • זוהי הרכישה השנייה שחברת התוכנה הישראלית מבצעת בארץ השנה

2

# Eight days a week



## **Productivity and Collaboration**

How organizations can harness the new tools to improve productivity?

Source: JANUS FILMS/CRITERION  
COLLECTION

# Technology-organizational model

## Productivity

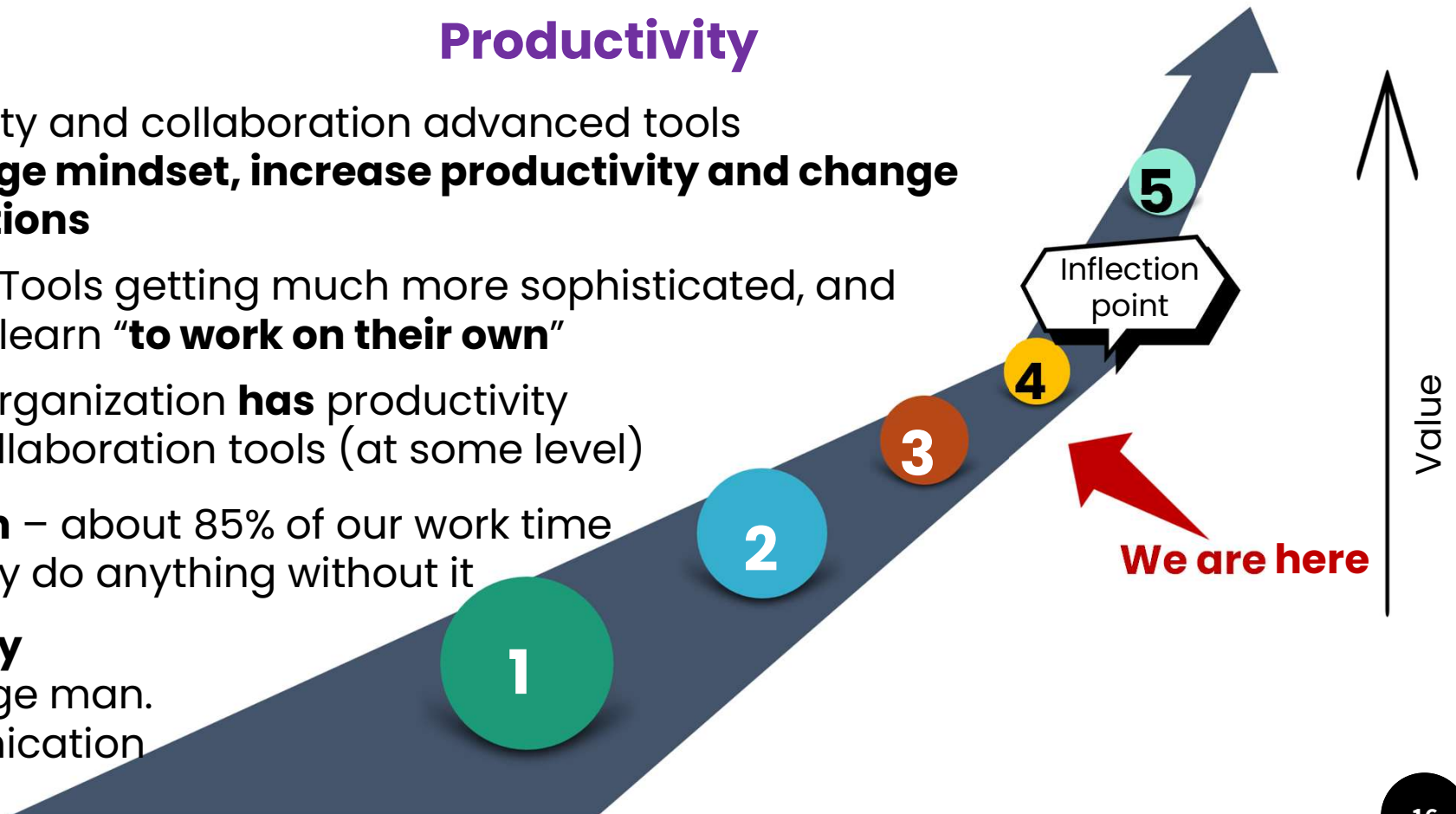
Productivity and collaboration advanced tools  
**Will change mindset, increase productivity and change organizations**

Tools getting much more sophisticated, and learn **"to work on their own"**

Every organization **has** productivity and collaboration tools (at some level)

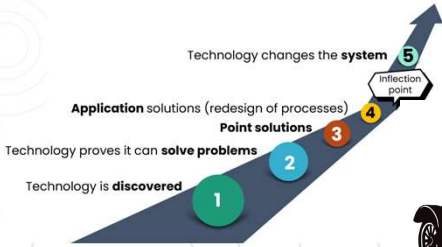
**Collaboration** – about 85% of our work time  
We can't really do anything without it

**Discovery**  
Knowledge man.  
Communication

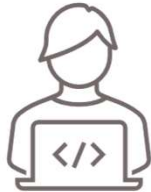




# Productivity



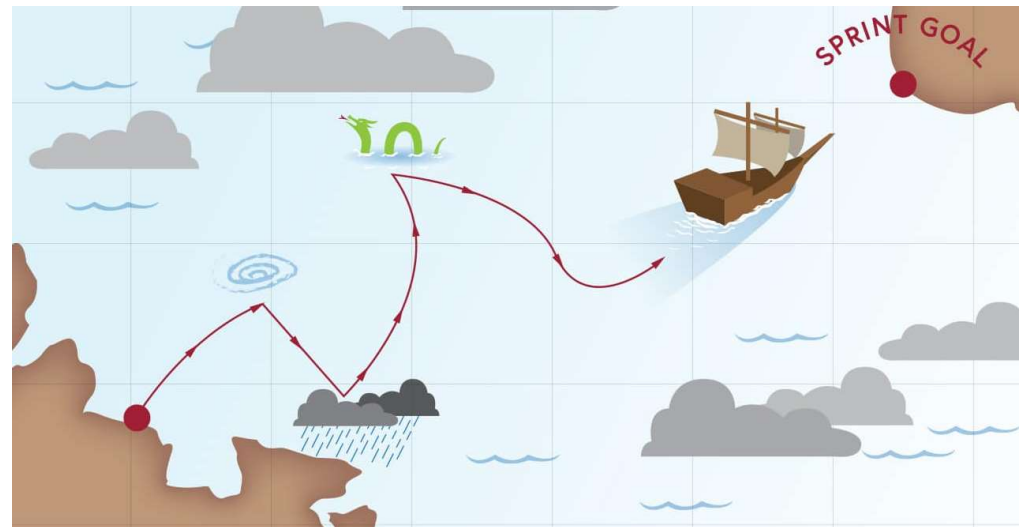
**Productivity 1923** – how many PRODUCTS we can Manufacture/ assemble in a certain amount of time.



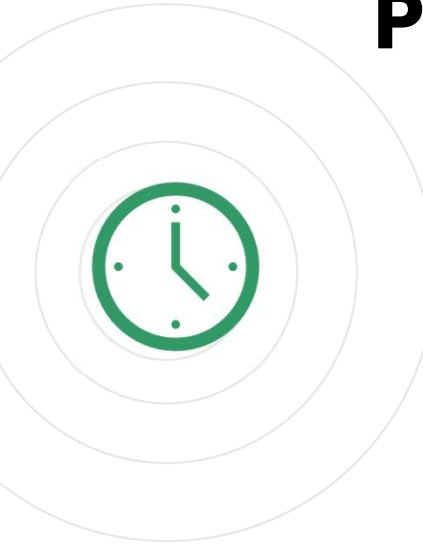
**Productivity 2023** – Methods, Skills, tools...



**Parkinson's law**– Work will expand to fill the time frame that was allocated.



# Productivity Numbers



**3-4**

**Productive hours per working day**



**Multitasking reduce productivity by**

**40%**

# Multitasking



## Easy Multitasking

Zoom/Teams and internal chat



## Mild Multitasking

Zoom and email.

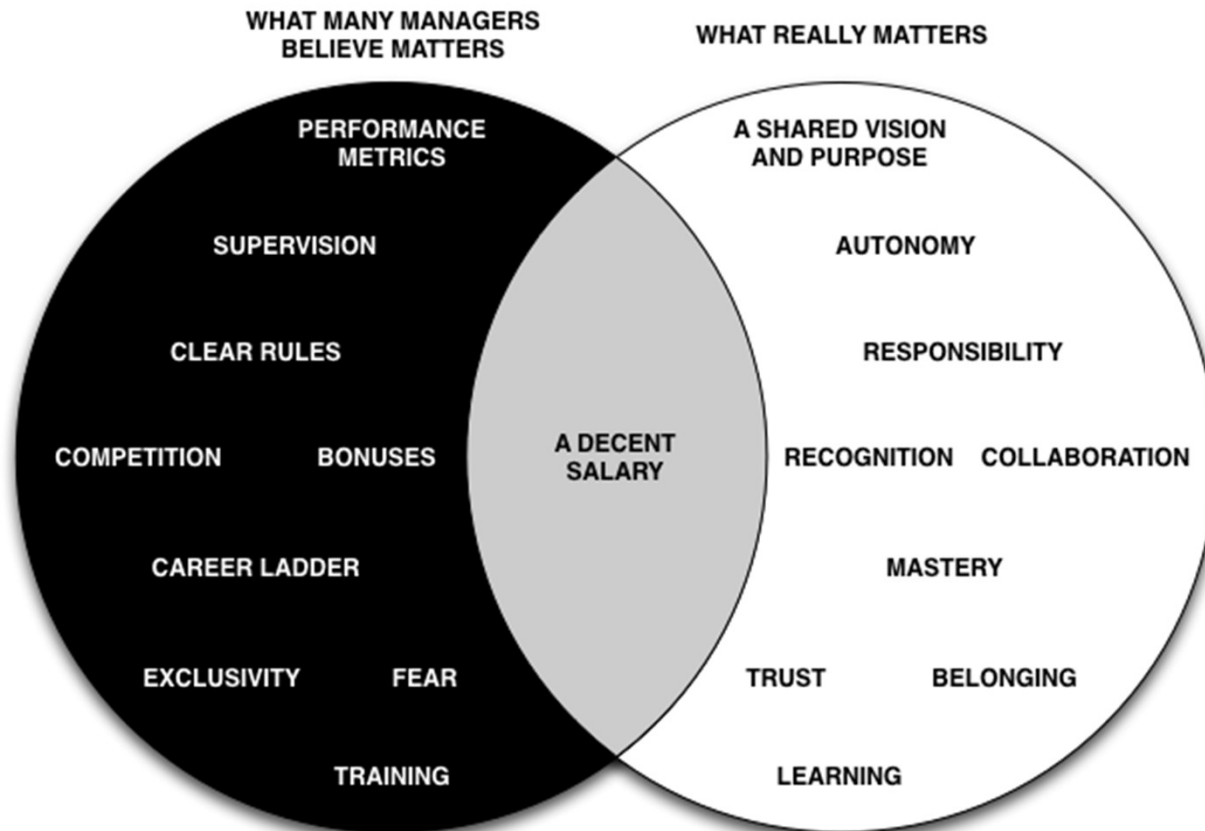


## Hard Multitasking

Zoom/Teams, email and WhatsApp  
And noise... (and kids..)

# Productivity and Engagement

## WHAT MAKES KNOWLEDGE WORKERS PRODUCTIVE?



## So... what can we do?



Reduce alerts and disruptions to minimum.



Try to go for easy or mild multitasking



Prioritize Wisely

# I RECOMMEND

1. Start with repetitive everyday Tasks, that doesn't give any real value, by using tools and automations such as **RPA**.

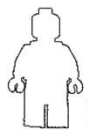
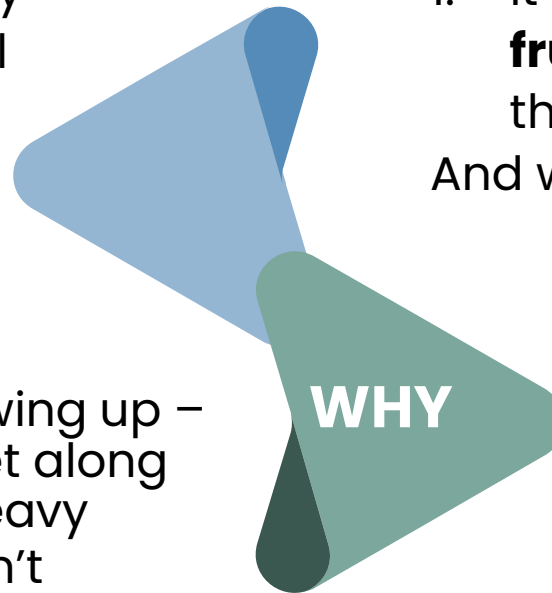
2. Keep track of the market,

**New and exciting tools** are showing up – especially AI that can help us get along with crazy time schedule and heavy workload. But Make sure you don't already have a certain tool in the organization, **duplicated tools are about 40% of enterprises SW portfolio.**

1. It will **lower employee's frustration**, from doing things repeatedly, And will improve productivity.

2. It's a long process, but showing **ROI** is relatively easy.

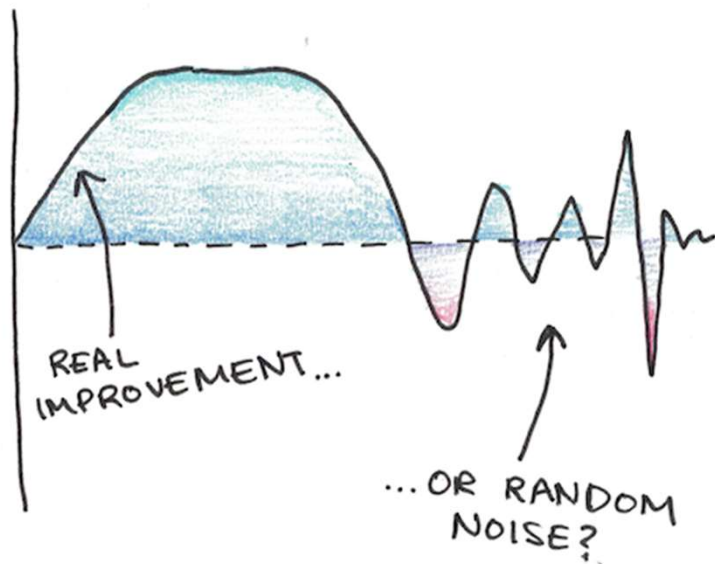
3. SW that has **more than one functionality** can be useful and save time and money.



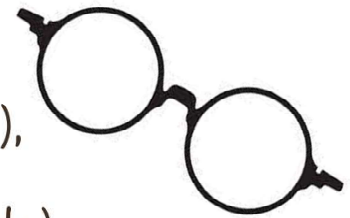
# A word to Vendors:

Just a Word.

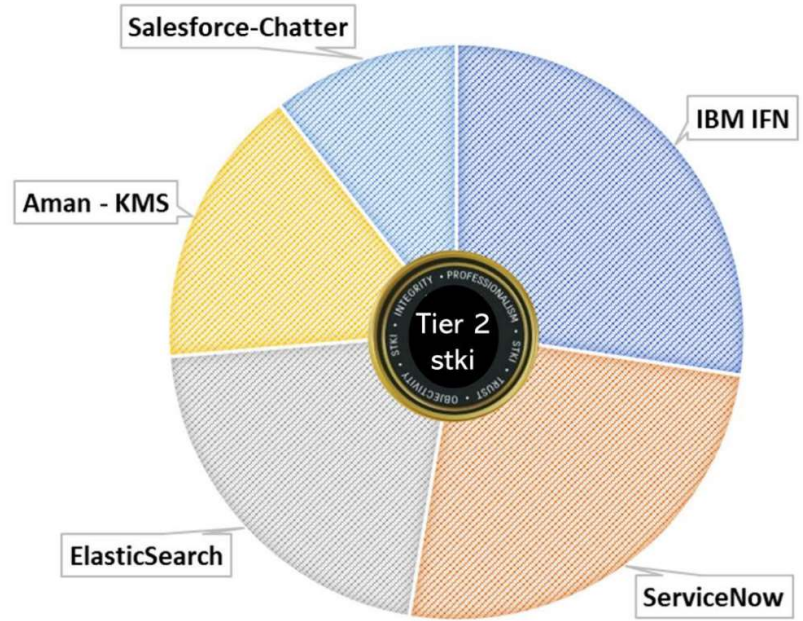
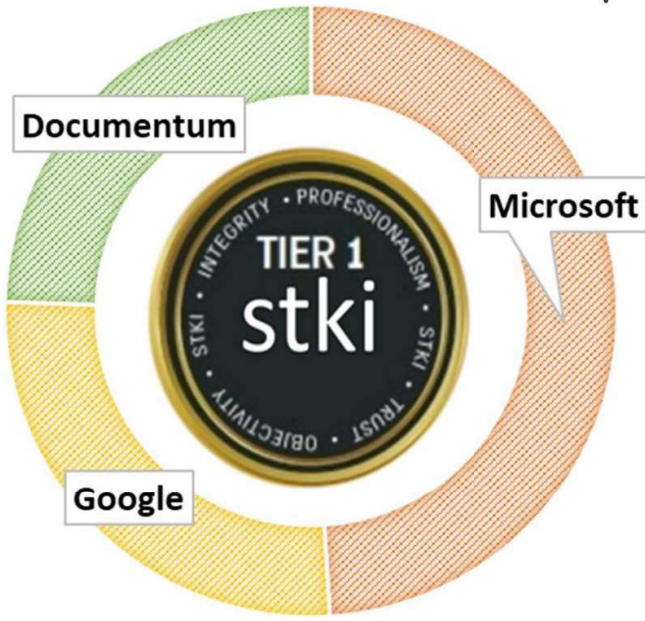
Almost every change will make an improvement, but what can you offer to users that is for the long run?



- 💡 Knowledge and documentation
- 💡 Automation
- 💡 Collaboration
- 💡 Time management
- 💡 Incentives



Office productivity (office calendar, mail etc.),  
KM (Enterprise Portals, ECM, Search, Knowledgebases tools)



We rank VENDORS by  
REVENUE  
and  
CLIENT MINDSHARE

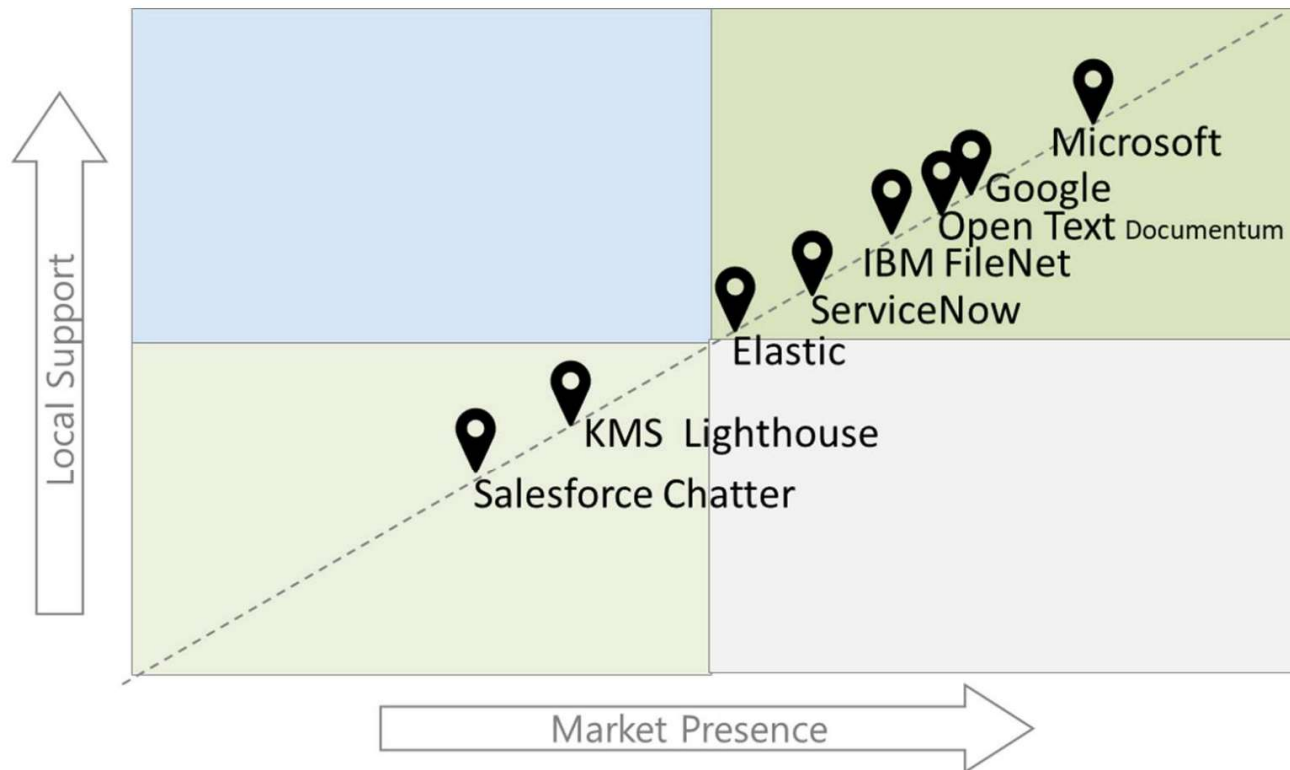


Copyright@STKI\_2023 Do not remove source or attribution from any slide, graph or portion of graph



# Presence & Support in Israel

## Office Productivity and Knowledge Tools



3

# Cloud Nine



Cloud native enterprise software.  
And what is happening in  
enterprises cloud ERP market?

Source:pxfuel

# Technology-organizational model

## Cloud ERP

### Enterprise will change

The software will dictate the way we work

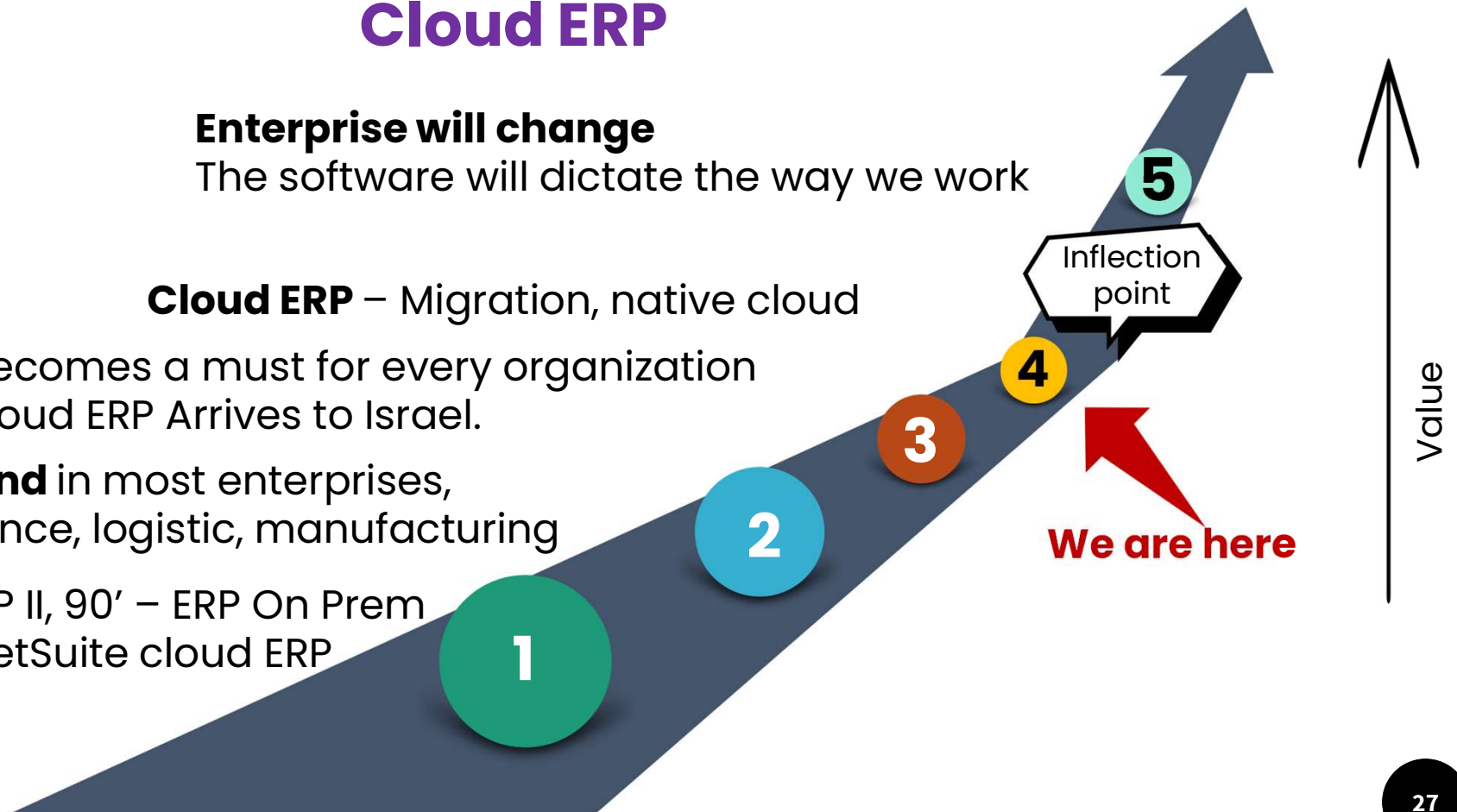
### Cloud ERP – Migration, native cloud

ERP becomes a must for every organization  
Big Cloud ERP Arrives to Israel.

**ERP expand** in most enterprises,  
From finance, logistic, manufacturing

80' – MRP II, 90' – ERP On Prem

**1998** – NetSuite cloud ERP



# Cloud ERP

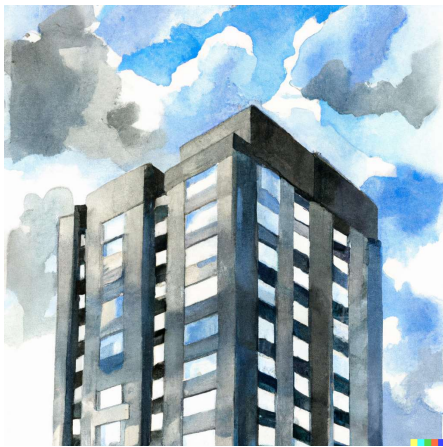


"In the era of ERP, most enterprises have lost their **Process Analysis Skills**. Most vendors prefer To start implementation, instead of process optimization"

Galit Fein



Access, Support, backups...



Lift and shift



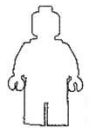
Move and improve



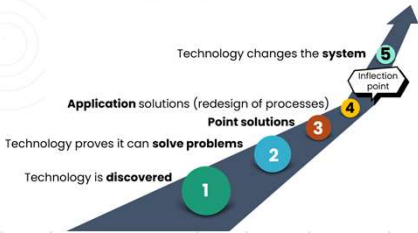
Cloud Native ERP



Single Vs. Multi Tenant



# Cloud Wars?



## Is ServiceNow Going to War With SAP and Oracle By Moving Into ERP?



By Bob Evans – May 22, 2023 – Updated: May 23, 2023 ⌚ 4 Mins Read

[f Facebook](#) [Twitter](#) [in LinkedIn](#) [Share](#)

Search ...



### Recent Posts

ServiceNow CEO Bill I  
Success in Digital Bus

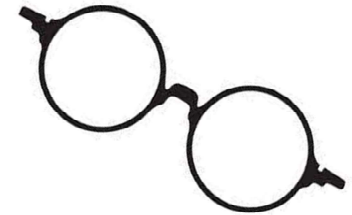
How Higher Education  
Changing the Game fr

How to Optimize Data  
Control and Real-Time

# The ERP Market for 2024

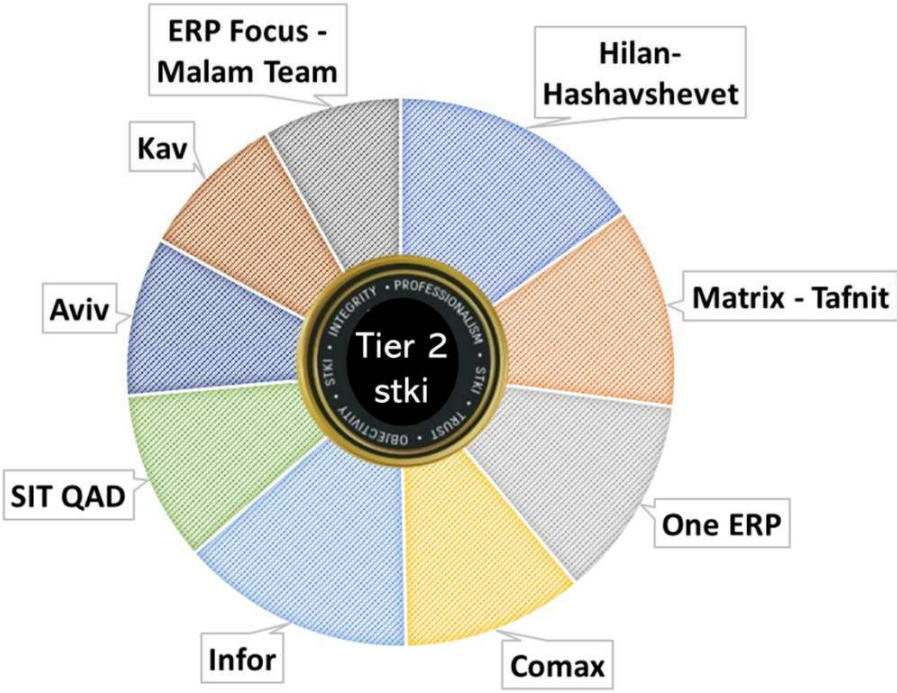
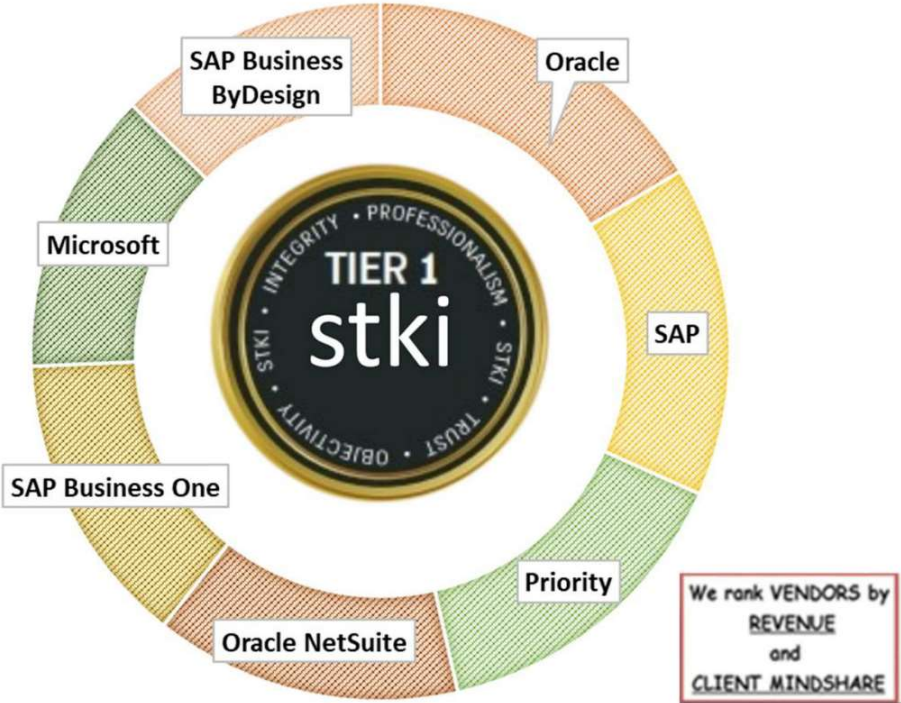
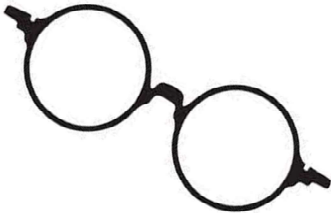
**Software 138M\$**  
**Implementations 145M\$**

**283M\$**

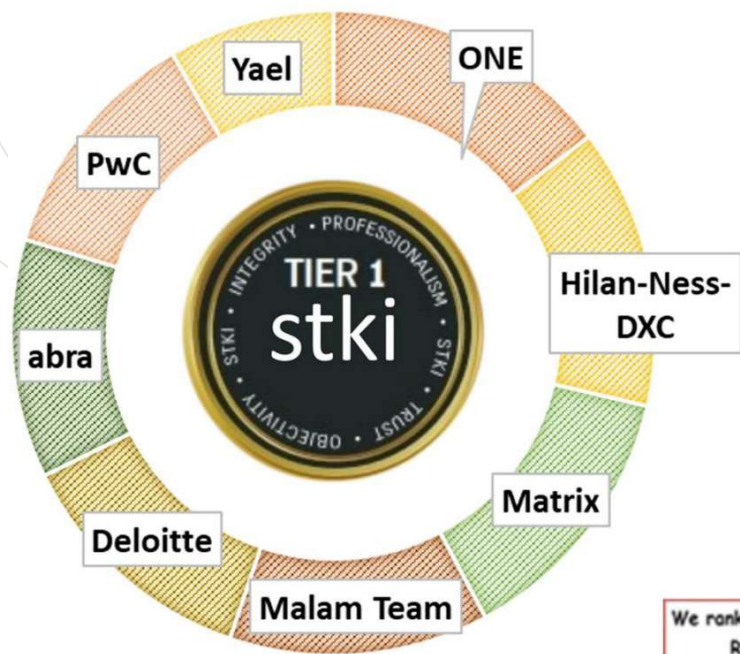
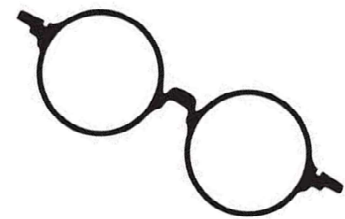




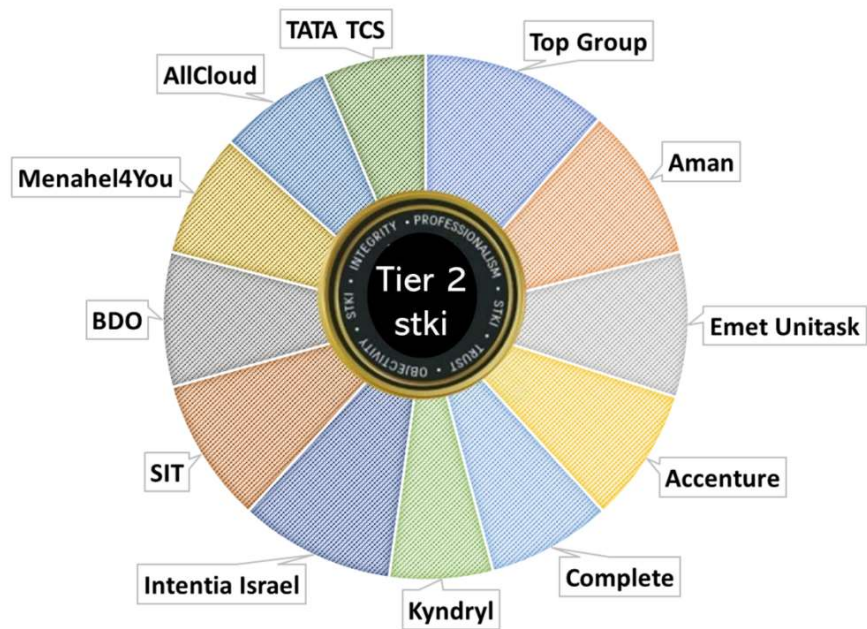
# ERP PACKAGES



# ERP Implementations



We rank VENDORS by  
REVENUE  
and  
CLIENT MINDSHARE





# I RECOMMEND

“Never choose the exact shoe size  
But two sizes up”

Dr. Jimmy Schwarzkopf



# A word to Vendors

Just a Word.

**Cloud Technology lower Barriers of entry.**

Consider core business areas you are currently not involved in.



# Thank You

